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March 2014

## UPDATE: IN SUPPORT OF CO-OPERATIVE EDUCATION AND TRAINING WITH CUBA'S FARMER CO-OPERATIVES

Five of us just returned from an exciting two days spent exchanging ideas with the Cuban Advisory Team and colleagues at ANAP (*Asociación Nacional de Agricultores Pequeño*) Training Centre Escuela Niceto Perez on how we can work together to help strengthen Cuba's farm cooperatives.

Things are going very well! A three-page report on our February 23-25 meetings follows. And our timing couldn't be better: the Cuban government's 2011 Policy Guidelines place major emphasis on strengthening the effectiveness of farmer cooperatives and supporting the development of worker cooperatives in the non-farm sector.

We believe Cuba could be an early success under ICA's Blueprint for a Cooperative Decade. The Blueprint identifies five areas requiring priority attention if co-ops are to become the fastest growing forms of enterprise by 2020. They are: *participation, sustainability, identity, legal framework and capital*. The work we are beginning with Cuba's Escuela Niceto Perez touches on three of them, introducing a Cuban version of the Coop Index then working with a pilot group of coops to help them to strengthen participation and cooperative identity within their organizations and membership. If this results in more successful integration of coop principles and values, we believe this will enhance the sustainability of Cuba's farmer cooperatives. Cuba appears to have ICA's fourth priority – legal framework – well in hand with a new coop law in the works. If Cuba wishes, cooperative leaders Paul Paruch (Atlantic Central), Willy Robinson (iNova Credit Union) and Milford Bateman have offered support in the area of strategic cooperative financing to provide safe access to capital that does not undermine coop values.

This is very exciting work, and our priority right now is funding to carry us through the next 3 years... Feel free to contact any one of us to discuss how you might support this important little project of international cooperation!

Warm co-operative regards...

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- Seven co-operative principles:
1. Voluntary and open membership
  2. Democratic member control
  3. Member economic participation
  4. Autonomy and independence
  5. Education, training, and information
  6. Co-operation among co-operatives
  7. Concern for community



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## **WORKSHOP SUMMARY**

### **ANAP Escuela Niceto Perez – February 23 and 24, 2014**

International Advisory Team members Sonja, Tom, Marcelo and I<sup>1</sup>, together with Peter Hough (CWCF, Coop Index), attended a wonderfully successful workshop on Monday and Tuesday of last week at Centro Nacional de Capacitacion de la ANAP Escuela Niceto Perez Garcia.<sup>2</sup>

This workshop was part of a 3 year strategic plan placed in my hands by ANAP President Félix Gonzales Veigo in June of last year. Mavis Alvarez and I were honoured to have been asked by Félix in February 2013 to assist him in its drafting.

Tragically, Félix Gonzales Veigo passed away suddenly on Tuesday February 18<sup>th</sup>. This project is a wonderful demonstration of his leadership and vision. We feel collectively challenged and inspired to make its success part of his legacy.

Our two-day start-up workshop could not have been more successful! Participating were Vice Director Armando Hernandez Romaro and five of his teaching staff (who led a discussion of the role, capacity and needs of ANAP's Escuela Niceto Perez); Cuban Advisory Board members<sup>3</sup> Mavis Alvarez, Grizel Donestevéz Sanchez, Gonzalo Gonzales and Anita del Risco; and SMU MMCCU Graduate Student Ivette Garcia, Professor at the University of Havana.

The first day of the two-day workshop focused on getting to know one another. To explore what each brings to the table and how we might work together to support the success of Cuba's farm cooperatives as they enter a new and exciting cooperative era (Los Lineamientos 2011).

The afternoon focused on sharing with the International Team a stronger understanding of how Cuba's three types of coops (CPA, CCS, UBPC) are structured, how they function, how they differ, and ANAP's role in supporting members and their cooperatives.

The morning of the second day focused on a presentation and wide-ranging discussion, led by Peter Hough, on the Coop Index: how it works, how it is structured, what it is and

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<sup>1</sup> Manuel and Bob were unable to attend.

<sup>2</sup> Preceded by a Sunday dinner meeting of International and Cuban advisory team members.

<sup>3</sup> Pablo Fernandez was unable to attend.

what it is not, how it is used in Canada and elsewhere, how it might be adapted (or designed from scratch) for use by Escuela Niceto Perez in their work with Cuba's socialist worker (CPA, UBPC) and producer (CCS) coops.

The afternoon of the second day focused on "next steps": Do we all agree on direction? If so how do we move this forward? The workshop concluded with the following accords:

1. The Vice President and members of the teaching staff of Escuela Niceto Perez value and accept the "Train the Trainers" invitation by ANAP to work with members of the International and Cuban Advisory Teams to strengthen farm cooperatives.
2. The Coop Index was recognized by Escuela Niceto Perez as a valuable diagnostic tool for members to understand better coop training needs and allow them to pursue more successfully their true cooperative potential.
3. The structural differences between Cuba's farm cooperatives suggest it may be possible to "tweak" the existing tool for CPA's and UBPC's, the tool will most likely require rebuilding from the ground up for Cuba's producer coops (CCS/CCSF's). It is possible that one tool can be designed and build for use by both, but this cannot yet be determined.
4. Two printed copies of the worker Coop Index questions, translated into Spanish, were circulated to the Cuban Advisory Team and the Escuela Niceto Perez for comment. It was acknowledged by all that this comes from a capitalist model and some changes will be necessary to fit the socialist context.
5. Members of the International Team asked for the following information:
  - a. Brief write up on structure and function of Cuba's three types of farm coops. Different ways in which they sell/market their products? How prices are determined?
  - b. Key management issues facing coops today?
  - c. Update on laws affecting coops (existing, update on proposed changes).
  - d. Armando Hernandez offered to circulate a recent document explaining recent changes to how cooperatives now market their products in Mayabeque and Artemisia provinces.
6. Members of the Cuban Team and Escuela Niceto Perez asked for a copy of Peter's Coop Index power point presentation in Spanish (Marcelo will translate). It is again noted that the English copy of the power point that many copied at the workshop has an error: on slide eleven, "ideal worker" should read "ideal worker cooperative".

7. Next step is for Coop Index tool developers to install a Spanish translation of the Coop Index report in a draft Cuban version of the tool.
8. The Cuban Team and Escuela Niceto Perez representatives will report back to the International Team with an estimate of how many (and which specific) questions might need to be changed in order to allow the tool to be successfully used by CPA's and UBPC's. It was generally agreed that if the number of questions needing rephrasing is ten or less, tweaking is likely possible. If there are a great deal more questions that need "adjusting", then the best course of action may be to design one Cuban Coop Index tool that works for all types of Cuban farm coops, if possible.
9. An Action Plan was summarized as follows:
  - a. Training workshop with Escuela Niceto Perez once Spanish tool available.
  - b. At the invitation of Escuela Niceto Perez, meet with members of a representative CPA and a UBPC to determine if the modified worker coop tool will be useful; fine tune questions as needed.
  - c. Analyse results: will modified tool work or is new, combined tool needed?
  - d. If yes, begin work with a pilot group of co-operatives – ANAP and member coops to select CPAs. ALAMAR Organoponico (UBPC) should be in the pilot project as well. Coordinating work for Alamar will be Gonzalo Gonzales (Cuban Advisory Team member, Alamar member), Grizel Donestevéz Sanchez (Cuban Advisory Team member, Univ. of Villa Clara prof in Cooperatives) and Ivette Garcia (MMCCU Cuban Student).
  - e. Begin discussions with Escuela and CCS members to design and build a Coop Index tool for Cuba's producer coops.
10. Gratitude was expressed to The Canadian Embassy in Havana and Atlantic Central for so generously supporting this workshop. Thanks were also expressed to all present for taking their professional time to collaborate on this important initiative.
11. Thanks to the excellent translation skills of Rose Ana Berbeo and colleague Nadia, the workshop was simultaneously translated into Spanish and English. An informal video of the 2-day workshop will be made available.

Prepared by Wendy Holm on behalf of International Advisory Team  
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# A PROPOSAL TO STRENGTHEN CUBA'S FARMER CO-OPERATIVES<sup>1</sup>

## Through Co-operative Education and Training

MARCH 2014

- Purpose:** We are seeking funding partners to support an ANAP<sup>2</sup>-led, three-year education and training program already underway to strengthen the co-operative skills of Cuba's farmer co-ops. The purpose is two-fold: a) to enhance their ability to achieve social, economic and sustainability goals and b) to develop the skills needed to come together in more complex, "new type" (second-tier) organizations.<sup>3</sup> This initiative grew out of a Dec 2011 workshop in Havana and subsequent Cuban engagement at IMAGINE 2012 and SUMMIT meetings in Quebec City in October 2012, the International Year of Co-operatives. This project is part of the "practical" track for the farm sector. A workshop was held February 23 and 24<sup>th</sup> (report attached):
- Context:** Cuba's farm co-ops have an important role to play as Los Lineamientos<sup>4</sup> moves Cuba towards a more co-operative, people-centered economy. Cuba's *private* farm co-operatives fall into two categories: worker coops (Agricultural Production Cooperatives or CPA's) and producer coops (Credit and Service Cooperatives or CCS's). They are represented collectively by their member-owned organization ANAP (National Association of Small Farmers). UBPC's - Basic Units for Agricultural Production, created from the division of large state farms in the early 90's following the collapse of the Soviet Union – are also worker coops.
- Opportunity:** To work together with the Cubans to develop a training model that will empower all three types of Cuban farm co-operatives to a) improve their internal (associative and organizational) integration of co-operative values, principles, management and governance and b) facilitate their ability to come together as strong second-tier entities.<sup>5</sup>
- Advisory Team:** International advisory team members include Wendy Holm, Manuel Mariño, Sonja Novkovic, Marcelo Vieta, Tom Webb and Bob Yuill. Cuban advisory team members include Mavis Alvarez, Grizel Donestevez, Pablo Fernandez, Gonzalo Gonzales, Manuel Alonso and Ana Maria Risco.
- Method:** National training seminars, in-depth member and organizational training sessions with co-operatives. Bringing in compelling cooperators like Bob Yuill to speak directly with farmers. Train the trainers courses. Co-op Index benchmarking/progress evaluation. Full Cuban ownership of training model, materials.
- Funding Sought:** \$ 250,000:
- √ \$80,000 to ANAP for in-country costs to support 3 years of meetings, travel, education and training, train the trainer initiatives, visits to Spain, Scotland and Canada;
  - √ \$50,000 to support additional in-Cuba costs to facilitate greater participation (e.g. UBPC's, allow larger group of Cubans to travel to international exemplars); and
  - √ \$120,000 to support 3 years of international travel, related expenses by non-Cubans.
- \$ Raised:** \$ 14,000
- √ \$ 5,000 Scottish Agricultural Organizations Society (pledged for travel for Bob Yuill)
  - √ \$ 4,000 Canadian Embassy in Havana
  - √ \$ 5,000 Atlantic Central
- Proposal:** ANAP's project proposal is posted at <http://www.wendyholm.com/ANAP.Prop.English.pdf>
- CONTACT:** For more information, please contact Wendy Holm, [wendy@wendyholm.com](mailto:wendy@wendyholm.com), 604-417-2434

<sup>1</sup> Wendy Holm, P.Ag. The Holm Team and Masters of Mgm't, Co-operatives & Credit Unions, Saint Mary's Univ, Halifax 604-417-2434

<sup>2</sup> ANAP (*Asociación Nacional de Agricultores Pequeño*) was founded by Cuba's private farmers in 1961.

<sup>3</sup> A second tier co-op is one whose members are co-operatives. Correctly undertaken, moving to a second tier offers benefits to all.

<sup>4</sup> Los Lineamientos is a set of policy guidelines adopted by the Cuban government in the Spring of 2011 – after extensive grass roots consultation - to renovate and modernize Cuba's economy consistent with the goals and values of socialism.

<sup>5</sup> Cuba supports the creation of more complex, "new type" (second tier) cooperatives. To accomplish this effectively CPA's, CCS's and UBPC's must come to the table with the same solid understanding of co-operative principles, values and organization.

## International Advisory Team Project to Strengthen Cuba's Farm Cooperatives through Support for ANAP's Co-op Education and Training Program



**Wendy Holm** (M.Sc.) a Canadian Agrologist and Agricultural Economist, has been bringing farmers and university students to Cuba since 1999. Since 2001, this work has been organized through ANAP, the Cuban farmers' organization. In the fourth and final year of Saint Mary's University's Masters of Management, Cooperatives and Credit Unions program, Wendy organized an international workshop on Cuba's cooperative path in Havana in December 2011 and provided background, logistical and networking support to the visit to four Cubans to the conferences Imagine 2012 and the Quebec International Summit on Cooperatives in Quebec City in October 2012. ANAP's three-year strategic plan to support cooperative training is based on a submission

Holm and Cuban colleague Mavis Alvarez tabled with ANAP – at the President's request - in early 2013.



**Manuel Mariño** (Contador Público Nacional, Universidad de Buenos Aires, Economista de Empresas, Universidad de Uppsala-Suecia) Since 2001, Manuel has served as the Regional Director of ICA-Américas and is based in San Jose, Costa Rica. Before this, Manuel was a consultant to ICA-Américas, Regional Director of the Swedish Co-operative Center for Latin America (based in San José, Costa Rica), and head of Swedish Co-operative Center development projects in Centro América, Uruguay, Paraguay, Kenya and Zimbabwe.



**Sonja Novkovic** (Ph.D.) is a Professor of Economics at Saint Mary's University. She teaches Global Economy and Society I in the Co-operative Management Education program. Her research interests are in the field of labour-managed and cooperative firms, social economy, and comparative economic systems. She has been engaged in the co-operative academic research through Canadian Association for Studies in Cooperation (CASC), the International Association for the Economics of Participation (IAFEP), and the International Cooperative Alliance Research Committee which she presently Chairs. Her current role as the Academic co-Director of Measuring the Cooperative Difference Research Network in partnership with the CCA also keep her involved with the Canadian cooperative sector. Her participation in a workshop on Cuba's move to a more

cooperative economy in Havana in December 2011 expanded her interests to the Cuban economy and its transformation.



**Marcelo Vieta** (PhD, Social and Political Thought, York University) is a Postdoctoral Fellow at the Social Economy Centre, Ontario Institute for Studies in Education at the University of Toronto (OISE/UofT). He is also a Research Fellow at the European Research Institute on Cooperative and Social Enterprises (EURICSE) in Trento, Italy. In addition, he is Research Associate at York University's Center for Research on Latin America and the Caribbean (CERLAC) and sits on the board of the Canadian Association for Studies in Co-operation (CASC). In recent years, Marcelo has been researching and publishing on the historical conditions, the political economic contexts, and the lived experiences of the worker-recuperated enterprises of Argentina; the social and solidarity economies of Latin America; and the cooperative movements of Italy and Canada.



**Tom Webb** (MA) is an Adjunct Professor at Saint Mary's University and recently retired as Program Manager of the Master of Management – Co-operatives and Credit Unions program. He teaches Global Economy and Society II and organizes and conducts the annual Field Research and Study Tour to Bologna and Mondragon in the Co-operative Management Education program. A former Director of Extension at St. Francis Xavier University, he also has 25 years experience as a co-operative manager, member of several co-operative boards of directors, co-operative business consultant and advisor to two cabinet ministers and the Prime Minister on regional development. His research interests cover a range of co-operative management issues and he has spoken widely on various aspects of co-operative business. He is currently involved in a major SSHRCC funded project exploring accounting in co-operatives and researching and writing about co-operative capital and co-operative economics.



**Bob Yuill** is Deputy Chief Executive of SAOS Ltd. Founded in 1903, SAOS (the Scottish Agricultural Organizations Society) is owned by 75 of Scotland's agriculture and food co-operatives who have a combined turnover of circa £3.2 Billion. The 20 largest co-operatives have an individual membership of 28,950 people. SAOS works with circa 650 board directors on a continuing basis, providing business consultancy, research, education, development of competitive strategies, membership loyalty programs etc. The purpose of SAOS is to ensure that Scotland's farming, food and drink businesses benefit from the commercial advantages that are achieved through co-operation and collaboration. The Scottish Government has supported SAOS's co-operative development work since 1911. The focus is on support for remote communities, providing innovation,

governance training for co-op directors and the development of new markets for farmers and the food industry. Bob manages the SAOS team of project managers taking a leadership role in initiating and carrying out strategic and business development with a wide range of co-operatives and communities. Bob's specialist skills include business planning, strategy development, board governance, commercial feasibility and partnership arrangements. His expertise concerns innovating co-operative strategy for difficult issues such as developing commercial solutions for where there is market failure, removing capital / revenue constraints, improving governance, installing financial planning and control and negotiating commercial partnerships. Bob Yuill is a graduate of the Master of Management Co-operative & Credit Unions program at St. Mary's University, Canada and participated in a workshop on Cuba's move to a more cooperative economy in Havana in December 2011.